

1/23

FIG. 1

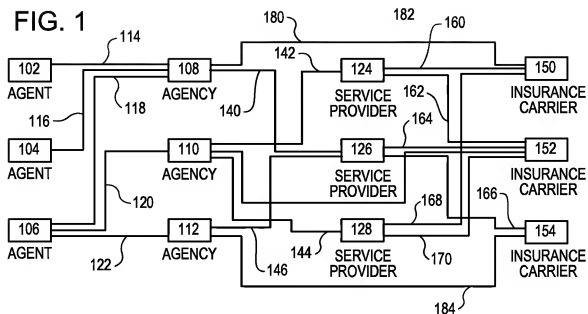


FIG. 2

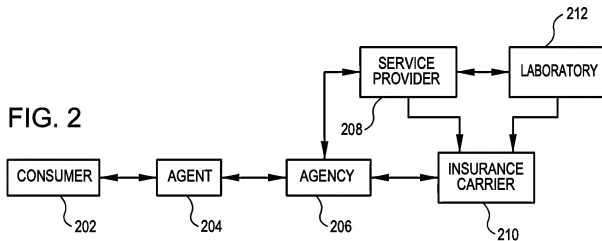


FIG. 3

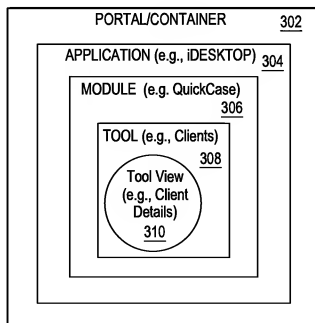


FIG. 4

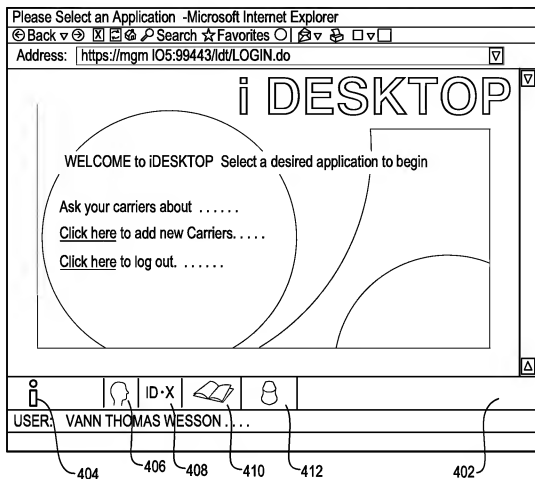


FIG. 5

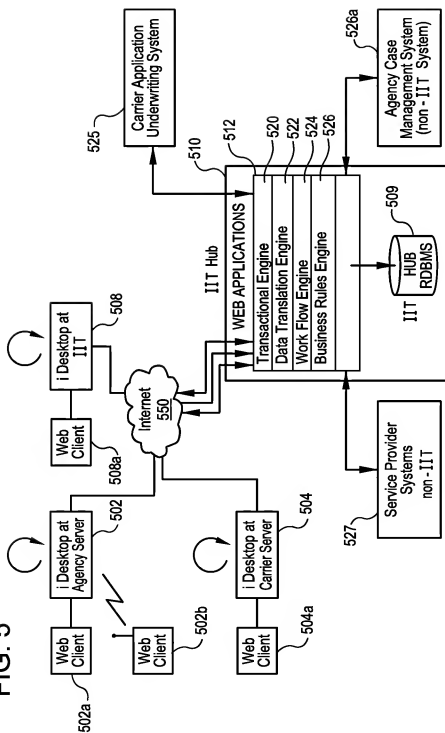


FIG. 6

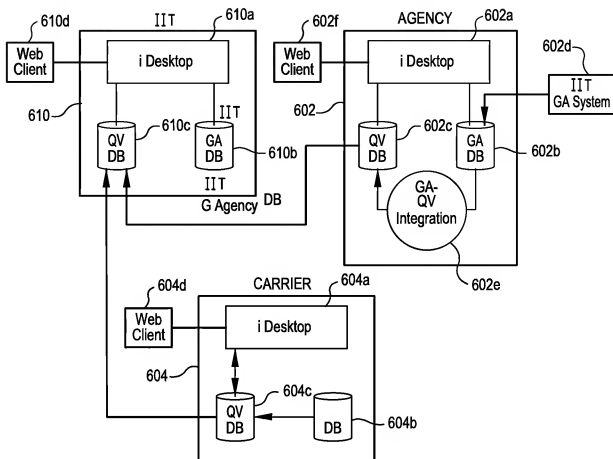


FIG. 7

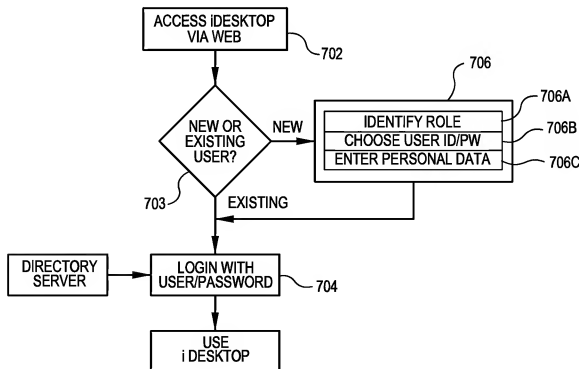
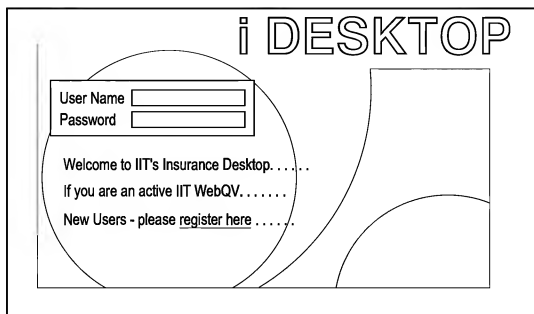


FIG. 8



iDESKTOP

User Name

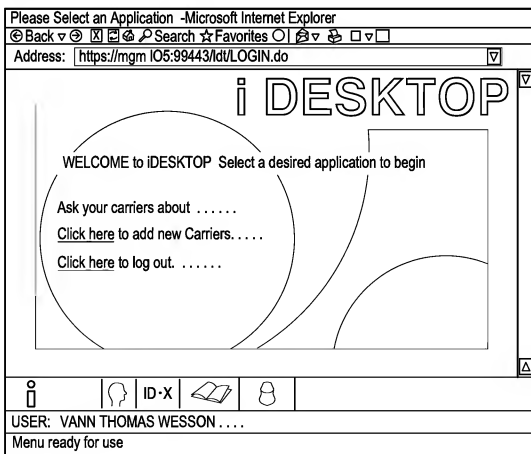
Password

Welcome to IIT's Insurance Desktop.

If you are an active IIT WebQV.

New Users - please [register here](#)

FIG. 9



Please Select an Application -Microsoft Internet Explorer

Back Forward Stop Search Favorites View Source Print

Address: <https://mgm IO5:99443/ldt/LOGIN.do>

iDESKTOP

WELCOME to iDESKTOP Select a desired application to begin

Ask your carriers about

[Click here](#) to add new Carriers.

[Click here](#) to log out.

USER: VANN THOMAS WESSON

Menu ready for use

FIG. 10

Agencies Summary - Microsoft Internet Explorer

Back Forward Stop Search Favorites Home Print View Source

Address: https://mgm105.99443/td/POLICY_SUMMARY.do?VIEW=CARRIER

iDESKTOP

1004 Action 1006 Tools 1008 Help

1012 Agencies 1014 Carriers Policies Follow-up 1016

1010 QuickView

1002

Agency

All Agencies

Agent Name

Agent Code

Insured Name

Policy Number

From M/D/Y

To M/D/Y

Policy Type Code

All Codes

Policy Status Code

All Codes

Reset Search

Agency	InsType	Status	Total Cases	Updated Cases	Total premium	Total Face Amount
FINANCIAL BROKERAGE, INC						
<input type="checkbox"/> Term			409	0	225,965.55	172,106,600.00
<input type="checkbox"/> Universal Life			398	0	234,521.97	169,261,000.00
<input type="checkbox"/> Submitted			11	0	21,396.583	21,875,000.00
<input type="checkbox"/> Not Taken			113	0	3,423.92	172,106,600.00
<input type="checkbox"/> Placed/Paid			113	0	225,965.55	169,261,000.00
<input type="checkbox"/> Postponed			1	0	234,521.97	21,875,000.00
<input type="checkbox"/> Withdrawn/Incomplete			1	0	21,396.583	172,106,600.00
<input type="checkbox"/> Issued			1	0	3,423.92	169,261,000.00
<input type="checkbox"/> Financial Brokerage, Inc 0314			609	0	225,965.55	21,875,000.00
<input type="checkbox"/> Term			553	0	234,521.97	172,106,600.00
<input type="checkbox"/> Inforce			216	0	21,396.583	169,261,000.00
<input type="checkbox"/> Pending			101	0	3,423.92	21,875,000.00
<input type="checkbox"/> Issued			115	0	21,396.583	21,875,000.00
<input type="checkbox"/> Withdrawn			18	0	3,423.92	172,106,600.00
<input type="checkbox"/> Incomplete			19	0	225,965.55	169,261,000.00
<input type="checkbox"/> Declined			38	0	234,521.97	21,875,000.00
<input type="checkbox"/> Not Taken			14	0	21,396.583	172,106,600.00
<input type="checkbox"/> Submitted			14	0	3,423.92	169,261,000.00
<input type="checkbox"/> Approved			13	0	234,521.97	21,875,000.00
<input type="checkbox"/> Postponed			5	0	21,396.583	21,875,000.00
<input type="checkbox"/> Universal Life			50	0	3,423.92	21,875,000.00
<input type="checkbox"/> Inforce			21	0	3,423.92	172,106,600.00
<input type="checkbox"/> Declined			2	0	234,521.97	169,261,000.00

USER: VANN THOMAS WESSON

Menu ready for use

FIG. 11

Carriers Summary - Microsoft Internet Explorer

Back Search Favorites

Address: https://mgn105.99443/idx/POLICY_SUMMARY.do?VIEW=AGENCY

i DESKTOP

Action Tools Help Agencies Carriers Policies Follow-up QuickView

Carrier

All Carriers

Agent Name

Agent Code

Insured Name

Policy Number

From M/D/Y

To M/D/Y

Policy Type Code

All Codes

Policy Status Code

All Codes

Reset Search

Carrier	InsType	Status	Total Cases	Updated Cases	Total premium	Total Face Amount
Companion Life			434	0	2,107,747.87	172,106,600.00
First Colony Life Insurance			33716	0	17,716,605.00	169,261,000.00
Interest Sensitive			77	0	21,396.583	21,875,000.00
Normal			11762	0	3,423.92	172,106,600.00
Pension			27	0	225,965.55	169,261,000.00
Term			19920	0	234,521.97	21,875,000.00
Universal Life			1940	0	21,396.583	172,106,600.00
GE Capitol			908	0	3,423.92	169,261,000.00
Normal			77	0	225,965.55	21,875,000.00
Term			749	0	234,521.97	172,106,600.00
Universal Life			37	0	21,396.583	169,261,000.00
United of Omaha			6995	0	3,423.92	21,875,000.00
Normal			507	0	21,396.583	21,875,000.00
Term			4176	0	3,423.92	172,106,600.00
Universal Life			2107	0	225,965.55	169,261,000.00
Pending			1167	0	234,521.97	21,875,000.00
Issued/Approved			249	0	21,396.583	172,106,600.00
Placed/Paid			223	0	3,423.92	169,261,000.00
Declined			92	0	234,521.97	21,875,000.00
Withdrawn/Incomplete			107	0	21,396.583	21,875,000.00
Not Taken			32	0	3,423.92	21,875,000.00
Deleted			21	0	3,423.92	172,106,600.00
Whole Life			205	0	234,521.97	169,261,000.00

USER: VANN THOMAS WESSON . . .

Menu ready for use

FIG. 12

Policies - Microsoft Internet Explorer

Back Forward Stop Search Favorites Home Print View Source

Address: https://mgm105:99443/idx/POLICY_SUMMARY.do

i DESKTOP

Action Tools Help

Agencies Carriers Policies Follow-up

QuickView

Carrier
First Colony Li

Agent Name
Agent Code
Insured Name
Policy Number
From M/D/Y
To M/D/Y
Policy Type Code
Term
Policy Status Code
All Codes

Reset Search

1202

1204

Page Size 5 Found: 19920 items (Remember this Search)

Policy #	Insured ID	Agent Name	Premium	Face Amount
<input type="checkbox"/> 0001849102	Turk, Paula Ann	Unknown	1112.59	350,000.00
<input type="checkbox"/> 1313012	Martinelli Robert Martinelli, Gina Martinelli, Jr. Robert	0101		100,000.00
<input type="checkbox"/> 1672530	Descamps, Cyril M	National Benefit Corporation	261.00	350,000.00
<input type="checkbox"/> 1787978	Vineberg, Allan	J B Hanauer Agency Inc. 0101 0101	282.50	150,000.00
<input type="checkbox"/> 1816253	Kashmanian, Ronald	0101	279.31	250,000.00

1206

USER: VANN THOMAS WESSON

Menu ready for use

FIG. 13

Policies - Microsoft Internet Explorer

Back Forward Stop Search Favorites Address: https://mgm105.99443/idx/POLICIES.do

i DESKTOP

Action Tools Help Agencies Carriers Policies Follow-up QuickView

Carrier
First Colony Li

Agent Name
Agent Code
Insured Name
Policy Number
From M/D/Y
To M/D/Y
Policy Type Code
Term
Policy Status Code
All Codes

Reset Search

Page Size 20 Found: 19920 items (Remember this Search)

✓ Policy #	Insured ID	Agent Name	Premium	Face Amount
<input type="checkbox"/> 8166147	DODD, Diana Lynn	Center Link Insurance & Financial Services Barry Wolf 0101, Private Ledger Insurance 0101 Robert Karras, 0101		
<input type="checkbox"/> 6754648	Johnsen, Mark R.	American Express 0101 Diversified Brokerage Services D.E. Swink 0101		
<input type="checkbox"/> 6754294	Chapman, Paul	American Express 0101 Diversified Brokerage Services Louis Basil 0101		
<input type="checkbox"/> 8102006	Huth, John W.	American Express 0101 George Van Deusen 0101 Diversified Brokerage Services Carl W. Heick 1901 0101		

USER: VANN THOMAS WESSON

Menu ready for use

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FIG. 14

Policy Details - Microsoft Internet Explorer

Back Forward Stop Search Favorites Address: https://mgmt05:99443/tdt/POLICIES.do

i DESKTOP

Action Tools Help Agencies Carriers Policies Details Follow-up QuickView

☐ Add to Selected

POLICY 8168147

Case:	Company: First Colony Life Insurance
Application	Policy Number: 816647
Insured(s)	Last Update: 04/21/2003
Agents(s)	Status Date: 04/21/2003
Requirement(s)	Plan: L14T
Coverage	Policy Date: 04/21/2003
Coverage Option(s)	Issue Date: 04/21/2003
Premium	Received Date: 3/11/2003
New Follow-up	Rating: PREF BEST
	Face Amount: 250,000.00
	Approved Date: 04/21/2003
	Policy Status: Pending
	Group No.:
	Placement Exp. Date: 06/21/2003
	Underwriter: CPEBBLES
	Application Type: Term
	Issue State: OH
	Qualified Plan Type:
	Smoker State:
	Issue Age:
	Issue Gender:
	Message: App Reviewed Mike Smith . . .
	GA Number:

1402

USER: VANN THOMAS WESSON . . .

Done

11/23

FIG. 15

Policy Details - Microsoft Internet Explorer

Back Forward Stop Search Favorites Address: https://mgmt05.99443/tdt/POLICIES.do

i DESKTOP

Agencies Carriers Policies Details Follow-up

QuickView

Action Tools Help

☐ Add to Selected

POLICY 8168147

Case

Application

Insured(s)

Agents(s)

Requirement(s)

Coverage

Coverage Option(s)

Premium

New Follow-up

Follow-up type:

Select a Type

Subject:

Contact Customer to ask for Health Record

Notes:

Call tomorrow

Due Date

Date Closes

Reset Search

August 2003

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Today is Thu. 21 Aug 2003

USER: VANN THOMAS WESSON . . .

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FIG. 16A

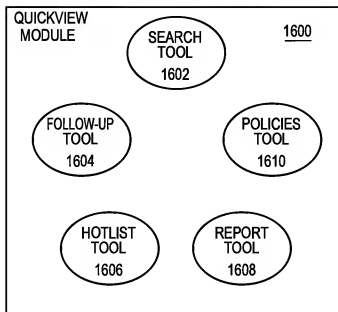


FIG. 16B

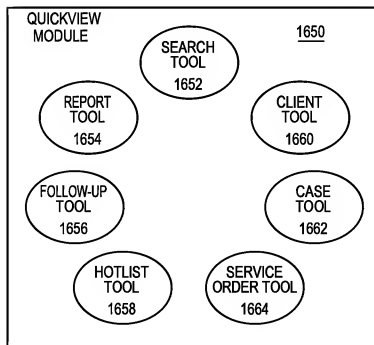


FIG. 17

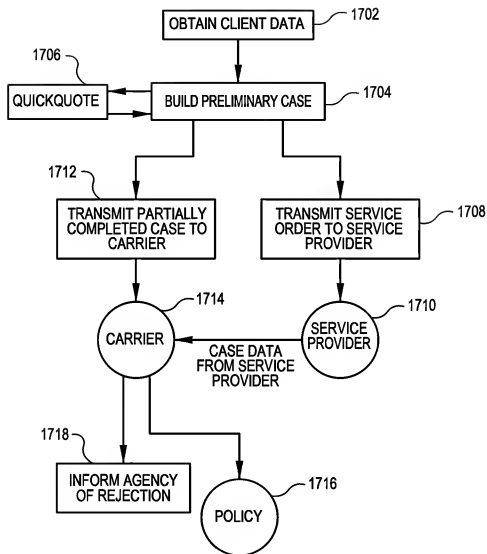


FIG. 18

Client Summary - Microsoft Internet Explorer

Back Search Favorites

Address: https://mgm105.99443/idx/CLIENT_SUMMARY.do

i DESKTOP

1802

Client Summary Clients Client Details Client Follow-up QuickView

Action Tools Help

First Name

Last Name

SSN

Ref. No.

Phone

E-mail

State or Residence
Select a state

Zip Code

Gender
Select Gender

Reset Search

Last name starts with: Total clients

1801

1800

USER: VANN THOMAS WESSON . . .

FIG. 19

Client Summary - Microsoft Internet Explorer

Back Search Favorites

Address: https://mgm105.99443/td/CLIENT_SUMMARY.do

i DESKTOP

Action Tools Help

Client Summary Clients Client Details Client Follow-up

QuickView

Page Size Found: 1 items (Remember this Search)

First Name	Last Name	SSN	City	State	DOB	Gender
<input type="checkbox"/> Mary	Tyler	231-34-5678	Portland	OR	11/23/59	Female

First Name

Last Name

SSN

Ref. No.

Phone

E-mail

State or Residence

Zip Code

Gender

USER: VANN THOMAS WESSON . . .

Menu ready for use

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FIG. 20

Client Details -Mary F. Tyler-Microsoft Internet Explorer

Back Forward Stop Search Favorites Address: https://mgmt05:99443/tdt/CLIENTS.do

i DESKTOP

Action Tools Help

2004

2006 ☐ Add to Selected
CLIENT: Mary F. Tyler

2008

Client Profile
New Address
New Phone
New E-mail
New Follow-up
Case(s)

Client Summary Clients Client Details Client Follow-up

QuickCase

Prefix Mrs.

First Name Mary

Middle Name Frances

Last Name Tyler

Suffix Select a suffix

DOB (M/D/Y) 09/23/1959

SSN 231 34 5678

Ref. No. 123456

Gender Female

US Citizen? ☒ Citizenship (if not) Select Country

Visa type Select Country

Visa Number

Best time to call

2002

Reset Update Delete

USER: VANN THOMAS WESSON

Menu ready for use

FIG. 21

Client Details - Tim A. Chen-Microsoft Internet Explorer

Back Forward Stop Search Favorites Address: https://mgm t05:99443/tdt/CLIENTS.do

i DESKTOP

Action Tools Help

Client Summary Clients Client Details Client Follow-up

QuickCase

Type Subject Due Date Closed

Add on ^op First follow-up 8/26/2003

Follow-up type:

Select a type

Subject:

Select a type

Notes:

Due Date:

Date Closed:

Reset Update

2102

2104

2106

CLIENT: Tin A. Chen

Client Profile

New Address

New Phone

New E-mail

New Follow-up Case(s)

USER: VANN THOMAS WESSON

Menu ready for use

FIG. 22

Clients - Microsoft Internet Explorer

Back Search Favorites

Address: https://mgm t05.99443/ldt/CLIENT_FOLLOWUPS.do

i DESKTOP

Action Tools Help

Client Summary Clients Client Details Client Follow-up

QuickCase

Quick Follow-up Search:

Follow-up Search by Criteria:

Closed Status:

Due Date From:

Due Date To:

Closed From:

Closed To:

Page Size Found: 1 items

✓	First Name	Last Name	SSN	City	State	DOB	Gender
<input type="checkbox"/>	Tim	Chen	456-32-1234	SanFran	CA	7/30/1987	Male
	2206	2204	2202				

2208

USER: VANN THOMAS WESSON . . .

Menu ready for use

FIG. 23

Cases - Microsoft Internet Explorer

Back Search Favorites

Address: https://mgm t05:99443/idx/CASES.do

i DESKTOP

2302

Action Tools Help

Case Summary Cases Case Details Case Follow-up

QuickCase

Insurance Company	Agency	Total clients	Total clients
Insurance Company <input type="text"/> Select Company Agency <input type="text"/> Select Agency Ref. No. <input type="text"/> First Name <input type="text"/> Last Name <input type="text"/> SSN <input type="text"/> Phone <input type="text"/> E-mail <input type="text"/> Zip Code <input type="text"/> <input type="button" value="Reset"/> <input type="button" value="Search"/>	<input checked="" type="checkbox"/> AIG Life	1	} 2304
	<input type="checkbox"/> Ash Brokerage	1	
	<input checked="" type="checkbox"/> American General Annuity	1	
	<input type="checkbox"/> Benefits Brokerage Agency	1	
2306			

USER: VANN THOMAS WESSON . . .

Menu ready for use

FIG. 24

Case Summary - Microsoft Internet Explorer

Back Search Favorites

Address: https://mgm105.99443/idx/CASE_SUMMARY.do

i DESKTOP

2302

Action Tools Help

Case Summary Cases Case Details Case Follow-up

2402

2406

QuickCase

Page Size 5 Found 2 items (Remember this Search) 2404

Insurance Company	Client	Agency
<input type="checkbox"/> AIG Life	Tim A. Chen	Ash Brokerage
<input type="checkbox"/> American General Annuity	Tim A. Chen	Benefits Brokerage Agency

2408

2410

Insurance Company
Select Company

Agency
Select Agency

Ref. No.

First Name

Last Name

SSN

Phone

E-mail

Zip Code

Reset Search

USER: VANN THOMAS WESSON . . .

Menu ready for use

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FIG. 25

Client Details - Microsoft Internet Explorer


Address: <https://mgm.t05:99443/tdt/CLIENTS.do>

i DESKTOP

Action | Tools | Help

2504  2506 ☐ Add to Selected

CASE: 123456
CLIENT: Tim A. Chen

2508  Case Profile
New Follow-up

Case Summary | Cases | Case Details | Case Follow-up

QuickCase

Ref. No.

Insurance Company

Agency

Base Plan

Premium Mode

Underwriter Class

Face Amount (\$)

Location

Rider:
Child:

Policy Number

Smoker Status

Height ft. in.
Weight

Beneficiary First Name Last Name

2502

USER: VANN THOMAS WESSON
Menu ready for use

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FIG. 26

Case Details - Microsoft Internet Explorer

Back Forward Stop Search Favorites Home

Address: https://mgmt05:99443/ldt/CASES.do

i DESKTOP

Action | Tools | Help

☐ Add to Selected

CASE: 123456
CLIENT: Tim A. Chen

2604

Case Profile
New Follow-up

Client Summary | Clients | Client Details | Client Follow-up

QuickCase

Follow-up type:
Select a type

Subject:

Notes:

2602

Due Date:

Date Closed

Reset Update

USER: VANN THOMAS WESSON

Menu ready for use

FIG. 27

Cases - Microsoft Internet Explorer

Back Forward Stop Search Favorites Address: https://mgm105.99443/rdt/CASE_FOLLOWUPS.do

i DESKTOP

QuickCase

Action Tools Help

Client Summary Clients Client Details Client Follow-up

Quick Follow-up Search: Page Size 5 Found: 3 items

Pick an option

Search 2706

Client	Ref. No.	Insurance Co.	Agency
<input type="checkbox"/> John A. Doe	333	AIG Life	Ash Brokerage
<input type="checkbox"/> Tim A. Chen	681	AIG Life	Ash Brokerage
<input type="checkbox"/> Howard A Hughes	608	American Agency Life	Ash Brokerage

Follow-up Search by Criteria:

Closed Status: Any status

Due Date From:

Due Date To:

Closed From:

Closed To:

Reset Search

2708

2704 2702

2700

USER: VANN THOMAS WESSON . . .

Menu ready for use